Clients – Individual Records – Dashboard Tab

Navigate to an individual Client record, then click the Dashboard Tab to view panels for Gatekeeping, Documents, Checklist, Send SMS, Skills, Notes and Security.

All the Dashboard panels can be opened or hidden by clicking on the title or dropdown arrow of each individual panel.

Gatekeeping

Here you can set important initial information about your new Client and their status on your eBoss database:

- Status 1 (e.g. prospect)
- Status 2 (e.g. industry)
- Souce (e.g. friend / google)
- Status (e.g. Accept to system)
- Send Email

Click Save to update the Gatekeeping settings for this Client.

Documents

Your uploaded Documents in relation to this Client are listed here. Simply click 'Upload a file', then select the file from your PC and click OK to upload.

Checklist

You can check off important requirements here such as

- Signed Terms
- Brochure Sent
- Welcome Call

(This checklist is customisable in Settings > Index > Setup Checklist > Clients Checklist)

Send SMS

Simply enter your message, select Send Now (or Send Later and add a date and time) and click Send to message your Client via SMS

Skills at a Glance

Your Client Skills are listed here

Notes

You can quickly view, edit and delete Notes relating to this Client in the Notes Panel

- Click the Pencil icon to edit
- Click the Trashcan icon to delete

Security

Here you can update the member’s area login username and password details for your Client should you have the Website option for your eBoss database.

Tick the ‘Send Email’ checkbox and choose a Template if you’d like to inform the Client of their new login details, then click Save.